

INTRODUCTION

Taylor Cole Planning is committed to protecting your privacy and personal information. Our Privacy Policy gives you detailed information on when and why we collect your personal information, how we use it and how we keep it secure. This Policy also sets out your right to request that we delete, update, transfer or provide you with access to your personal information. This Policy should be read alongside our Standard Terms & Conditions of Engagement. Please also note that this Privacy Policy only applies to personal information obtained by us - not information collected from your interactions with third parties.

WHO WE ARE AND HOW TO CONTACT US

Taylor Cole Planning is the trading name for Taylor Cole Planning Limited (hereafter “we”, “us” or “our”). Taylor Cole Planning Limited is a data controller and is registered at the UK Information Commissioner’s Office.

Taylor Cole Planning Limited is a company registered in England with company number: 10097010 and whose registered office is at 367B Church Road, Frampton Cotterell, Bristol, BS36 2AQ

If you have any questions about this Privacy Policy or want to exercise your statutory rights, please contact us by sending an email to sara@taylorcoleplanning.co.uk

REASONS/PURPOSES FOR PROCESSING INFORMATION

We process personal information to enable us to provide consultancy and advisory services or carry out a contract with you, to promote our services, to maintain our own accounts and records and to support and manage our business.

WHO THE INFORMATION IS PROCESSED ABOUT

We process personal information about our customers, clients and employees, complainants and enquirers, suppliers, advisers and other professional experts.

TYPES/CLASSES OF INFORMATION PROCESSED

We process information relating to the above reasons/purposes. This information may include:

- Personal details; name, address(es) telephone number(s) and email address(es), nationality.
- Family details, lifestyle and social circumstances

- Financial details
- Education details
- Employment details

We process other information not listed above which is not personal data.

We also process sensitive classes of information that may include:

- Physical or mental health details

WHO THE INFORMATION MAY BE SHARED WITH AND WHY

Information is processed for consultancy and advisory services that are offered. We sometimes need to share the personal information we process with other organisations. Where this is necessary we are required to comply with all aspects of the General Data Protection Regulation (GDPR). What follows is a description of the types of organisations we may need to share personal information:

| TYPE OF ORGANISATION | REASON FOR SHARING |
|---|---|
| Business associates and other professional advisers and consultants | In order to provide our services to you; we may need to deal with professional advisers, agents, brokers, lenders and other parties on your behalf and in connection with our services, depending on the nature of the services you would like us to deliver, in order to fulfil our contractual obligations to you |
| Financial organisations | Managing payments, fees and charges and collecting and recovering money owed to us |
| Current, past or prospective employers | References, verification of right to work |
| Educators and examining bodies | We may contact educators and examining bodies in order to verify credentials provided to us in support of your employment |
| Suppliers and services providers | Suppliers and service providers are engaged to assist in the operation |

| | |
|----------------------------------|--|
| | of our business and the running and maintenance of our systems. We may release your information to third parties if required to do so by law |
| Consulting and advisory services | We may need to share your details with others in order to provide and/or improve the services provided to you |

These third parties act for us for the purposes outlined in this policy, (processing information, processing credit card payments, and providing support services on our behalf). In providing the services, your personal information will, where applicable, be used by the service provider on our behalf.

We will check any third party that we use to ensure that they can provide sufficient guarantees regarding the confidentiality and security of your personal information. Where necessary, we will have written contracts with them which provide assurances regarding the protections that they will give to your personal information and their compliance with our data security standards and international transfer restrictions. Some of the information provided to us may be accessed by third parties, some of whom may be located outside the European Economic Area (EEA). Where a third party is outside the EEA we will ask that they treat your data with the same care, confidentiality and security as if it were in the EEA.

In certain circumstances, we share and/or are obliged to share your personal information for business administration and legal compliance purposes with third parties. For example, we may use your personal information in connection with a business transition, to enforce our legal rights and/or to protect the rights of third parties and it is in our legitimate interest to do so. In such instances it will be necessary to share your personal information with external professional advisors such as lawyers and accountants, or insurers or financial institutions. These parties must keep your information confidential.

We may use your personal information for legal compliance purposes and to enforce our legal rights. In such instances it will be necessary to share your personal information with external parties such as administrative authorities (HMRC), police and public prosecutors or to comply with a court order. It is our legal obligation to do so.

Unless required or permitted to do so by law, we will not otherwise share, sell or distribute any of the personal information you provide to us without your consent.

SALES & MARKETING

For the purpose of email marketing, we collect names and email addresses of those that wish to receive our email newsletter. This information is collected via a sign-up form on our website, at sales meetings, upon instruction and upon direct enquiry by the data subject. For those that have consented to email marketing, we use names and email addresses so that we can keep people informed about relevant news and projects. We may also use physical address data to ensure the emails are as relevant as possible. These emails will only ever be sent to people that have chosen to receive them.

We may invite you to provide feedback about our consultancy services in the form of online, or postal surveys. We use this information to help us improve the quality of service provided. We may use third-party service providers to assist us with client surveys and feedback requests.

WEBSITE; USE OF COOKIES AND SIMILAR TECHNOLOGIES

We may collect information about your usage of our website.

A cookie is a small file which asks permission to be placed on your devices memory. Cookies help analyse web traffic or lets you know when you visit a particular site.

We use traffic log cookies to identify which pages are being used. This helps us analyse data about web page traffic and improve our website to tailor it to customer needs.

A cookie in no way gives us access to your device or any information about you, other than the data you choose to share with us. You can choose to accept or decline cookies. Most web browsers automatically accept cookies, but you can usually modify your browser setting to decline cookies if you prefer.

Our website, social media posts and emails contain links to third party websites and services. Please remember that when you use any such links to go from our Sites to another website or you request a service from a third party, this Privacy Policy no longer applies.

OUR SECURITY AND YOUR DATA

We take data security very seriously and take measures to ensure our systems are secure.

We keep your personal information in line with our data retention policy. We only retain information for as long as it is required. We are committed to keeping the personal information you provide to us secure and we take reasonable precautions to protect your personal information from loss, misuse, alteration or unauthorised disclose/access. We do not sell your personal information for any purpose. We have implemented information security policies, rules and technical measures to protect the personal information that we have under our control from unauthorised access, improper use or disclosure, unauthorised modification and unlawful destruction or accidental loss. All of our employees and data processors (i.e. those who process your personal information on our behalf, for the purposes set out in this policy), who have access to, and are associated with the processing of personal information, are obliged to respect the confidentiality of the personal information of all users of our services.

HOW YOU CAN ACCESS AND UPDATE YOUR INFORMATION

If you'd like to know what data we hold or to update your details, please contact sara@taylorcoleplanning.co.uk

YOUR DATA AND YOUR RIGHTS

Under the Data Protection Laws your rights are:

- **To be informed** - We must make available this privacy notice with the emphasis on transparency over how we process your data.
- **Access** - You are entitled to find out what details we may hold about you and why.
- **Rectification** - We are obliged to correct or update your details.
- **Erasure** - This is also known as the request to be forgotten.
- **Restrict processing** - You have the right to 'block' or suppress the processing by us of your personal data.
- **Data portability** - You have the right to obtain and reuse your personal data that you have provided to us.
- **Object** - You have the right to object to us processing your data in relation to direct marketing and or profiling.
- **Rights in relation to automated decision making and profiling** - We do not use automatic decision making or profiling.

You can withdraw consent for us to use your data at any time. This can be done by emailing sara@taylorcoleplanning.co.uk and asking to speak to the Business Manager. You may also contact the Information Commissioners' Office (ICO) if you have cause to complain. The contact details for the ICO are available [here](#).

REVIEWING THE POLICY

This policy will be reviewed from time to time and any changes will be posted on this page.